

Requests for Reprints of Forms W-2

All 1996 W-2s have been mailed to the employee's home address as it appears in the payroll systems as of 1/17/97.

In the event that an employee requests a reprint of a Form W-2, we are providing the following guidelines and instructions.

1. Departments must be sure to give (or mail) a reissued statement only to the employee identified on the Form W-2.
2. Before delivery to an employee, the IRS instructs that reprinted Forms W-2 be marked as "Reissued Statement." These words should appear typewritten at the bottom of Copies B, at and 2, and at the top of Copy C.
3. For departments with the capability to reprint Forms W-2 on a PC with the Forms version of **DocumentDirect**, instructions are attached. The appropriate reports are as follows:

PMIS regular employees = PMW2RN11

CAPS regular employees = CTCP9E10

PMIS contract employees = PMW2RN31

CAPS contract employees = CTCP9F10

If you have questions regarding **DocumentDirect**, please contact Bob Ragucci of ITD at (617) 660-4555

4. For departments that do not have access to **DocumentDirect**, and need to reprint Forms W-2, please contact Denise at the Payroll Unit, (617) 727-5000 extension 338.

Forms W-2 Returned to Department as Undeliverable

Forms W-2 were mailed by the Commonwealth on behalf of departments. Any undeliverable forms will be returned to the Office of the Comptroller and forwarded to the individual department's PMIS Coordinator or CAPS Liaison for final delivery to employees. The IRS

instructs that any Forms W-2 a department cannot deliver should be retained on file by the department for four (4) years.

Form W-2 Other Income

Any requests for tax information on Other Income W-2s should be directed to Mary Paris of the Operational Services Division at (617) 727-7500, extension 306.

Printing Instructions for W-2 Using DocumentDirect

The following are step-by-step instructions to reprint W-2 forms from **DocumentDirect** to replace misplaced or lost W-2 forms.

From basic PC start-up:

- Log on to ITD Gateway Main Menu. *The screen will show a number of selections, and you are asked to Type Selection ID Name: _____*
- Select VIEWPC to enter DOCUMENTDIRECT. *You may either put 's' in the slot to the left of VIEWPC or tab down, then press ENTER*

- The 'CICS News Service' screen appears, asking you to make a selection from 5 options. Enter '99' at the lower right hand corner of the screen where it says YOUR SELECTION ____ Press 'enter.'
- You will see a blank screen with your Mainframe Display. Minimize this screen by clicking on the inverted triangle at top right of the window.
- The dashboard will appear with various icons to be selected. Choose **DocumentDirect**. *It is a picture of triple pages.*

From open version of DocumentDirect:

- When the **DocumentDirect** application window opens, select File from the menu bar across the top of the screen.
- From the highlighted choices available in the open File menu, select Document Explorer by clicking on it.
- The **Document Explorer** window opens, showing on the left, REPORTS, followed by a series of letters. Click on REPORTS to highlight it, then click on LOCATE to select it from the four choices across the top of the window.
- The **Locate** window opens, showing REPORTS in the space next to Server. Move the cursor to the second row, next to the Report ID space. Type in PMW2RN11 (for a regular PMIS employee, for example) to request W-2 printing. Click on the Locate key. *This is where you would type in the name of any report you were looking for in DocumentDirect.*
- A new window appears - **Attach to Server**. In the space for Recipient ID, type in your own UAID, and click OK. *This is for security restriction to authorized users.*
- **Document Explorer** now shows 2 tables inside its window: on the left, a list of reports, and on the right the versions of the report by date. PMW2RN11 will be highlighted, and you want to use the version with the most current date. Select it by double-clicking on the date. *This will take some time to access.*
- After the delay while the report loads, a blank 1996 W-2 form appears in a new window. Above on the main toolbar for **DocumentDirect**, press the icon for 'GoTo.' *It is a picture of a hand with a finger pointing to the right.*
- The **GoTo** window appears, showing in the Locate space numbers representing agency (3 digits), then SSN (Social Security Number). Type in your own 3 digit agency, a space, then the SSN of the employee, including the hyphens (-) . Click on the flashlight icon to the right of the Locate space. *For a CAPS payroll there will be a 4 digit org code before the SSN.*
- **DocumentDirect** will search for the combination of agency and SSN you entered. When it has been located, it will appear, highlighted, at the bottom of the Selection box. Click OK to accept.
- The **GoTo** box disappears, and now the W-2 window displays the W-2 record for the employee you requested. Note that at the bottom of the screen you will see the agency number and SSN, and the number of pages in the employee record.
- **Important:** Before printing, you must select View from the **DocumentDirect** menu bar, then click Fit on Selected Paper. Then, from the toolbar along the top of the **DocumentDirect**, select the icon that looks like a printer to print the first page only.
- Remember that you need not print any more pages from an individual employee W-2 record. The second page contains only distribution instructions for the W-2 copies, so you can print it once and photocopy for as many employees as necessary.

Note: The totals page for the number of Forms W-2 printed for an agency or department is found by selecting the agency number, or department code only (no SSN) from the **GoTo** window.

